

## CLAIMS

What is Claimed is:

1. A method for managing data in automatic call distribution system, comprising a call center forwarding, a CTI instance for forwarding control and/or an interactive voice response unit as well as a customer database and an agent workstation, comprising:

transmitting caller data from the call center forwarding and/or the interactive voice response unit to the CTI instance;

determining customer data from the customer database by the CTI instance on the basis of the caller data;

formatting the customer data in a customer data document by the CTI instance, the customer data being formatted in accordance with an access level assigned to an agent having access to an agent workstation; and

providing the agent with the customer data document through the agent workstation.

2. The method in accordance with claim 1, wherein  
the access level is selected from a plurality of graded access rights,  
during a booking-in process of an agent and/or an agent workstation, an agent profile is activated, which identifies previously-specified access rights to customer information, and  
the customer data document is generated from the customer data by matching access rights to the activated agent profile.

3. The method in accordance with claim 1, wherein  
the customer data is formatted in accordance with an access level by a method comprising:  
all customer data is associated with one or more access levels identifying the types of agents that should be allowed access to the data,  
all customer data is searched to find data having an access level that matches the individual agent, and  
the customer data document is assembled by compiling the data having a matching access level.

4. The method in accordance with claim 1, wherein

an access address is assigned to the customer data document, which address refers to an area of a working memory occupied by the customer data document, and  
the access address of the customer data document is transmitted to the agent workstation.

5. The method in accordance with claim 1, wherein  
the customer data document is buffer stored in a working data memory,  
the working data memory is independent of the customer database, and  
the agent workstation accesses the customer data document from the working data memory.

6. The method in accordance with claim 1, wherein  
the customer data document is created in a markup language, and  
the agent is provided with the customer data document from the agent workstation by a browser for the markup language.

7. The method in accordance with claim 6, wherein  
the customer data document is created as an HTML document, and  
the browser is an HTML browser.

8. The method in accordance with claim 5, wherein  
the customer data document is created as a HTML document,  
the working data memory is a webserver,  
a URL address is assigned to the HTML document, and  
the URL address is transmitted to the agent workstation to provide the agent with the customer data document.

9. The method in accordance with claim 7, wherein  
a URL address is permanently assigned to the agent workstation,  
the customer data document created as an HTML document is stored in a server assigned to the agent workstation,  
the server has an "update" function,

the "update" function is triggered by a connection of a caller to the agent workstation,  
and

the customer data document is opened by triggering the "update" function.

10. A method in accordance with claim 1, wherein the customer data document is provided to the agent independently from the customer database.

11. A system for an automatic call distribution, comprising:

a call center forwarding unit to forward caller data regarding a caller,

a CTI instance unit comprising:

a first converting device to convert caller data into search parameters for searching customer data in a customer database;

a second converting device to convert a first data format of data from the customer database to a second data format of a customer data document, and to create the customer data document so that it contains information matching access rights of an agent who will address the caller;

a working data memory to store the customer data document independent from the customer database; and

an information provision unit to provide the agent with access to the customer data document.

12. The system in accordance with claim 11, wherein the caller data is determined from an automatic call number identification unit.

13. The system in accordance with claim 11, further comprising an interactive voice response unit to determine caller data from an automated telephone dialogue.

14. The system in accordance with claim 11, wherein the first converting device converts caller data from a DNIS system into search parameters for a search operation of customer data in the customer database.

15. The system in accordance with claim 11, wherein

the access rights of an agent who will address the caller are defined by an access profile, and

the system further comprises an assignment device to assign customer data to the agent profile.

16. The system in accordance with claim 11, wherein the second converting device converts the first data format into a markup language.

17. The system in accordance with claim 16, wherein the second converting device converts the first data format into an HTML markup language.

18. The system in accordance with claim 11, wherein  
the information provision unit creates an access address of the customer data document, and  
the access address is a URL address.

19. The system in accordance with claim 11, wherein  
the agent accesses the customer data document through an agent workstation,  
a URL address is permanently assigned to the agent workstation,  
the agent workstation has an "update" function, and  
the customer data document corresponding to the URL address is opened when the caller is connected to the agent workstation.

20. The system in accordance with claim 11, wherein  
the working data memory is a webserver external to the customer database  
the customer data document is stored in the webserver as HTML data, and  
the agent is provided with the customer data document from the webserver through a URL address.

21. A method for managing data in automatic call distribution, comprising:  
determining caller data to identify a caller;  
determining customer data from a customer database on the basis of the caller data;

formatting the customer data to create a customer data document based on an agent security level, the agent security level identifying the types of information to which a call answering agent is permitted access; and

providing the call answering agent with the customer data document through an agent workstation.

22. The method in accordance with claim 21, wherein  
the access level is selected from a plurality of graded access rights,  
during a booking-in process of an agent and/or an agent workstation, an agent profile is activated, which identifies previously-specified access rights to customer information, and  
the customer data document is generated from the customer data by matching access rights to the activated agent profile.

23. The method in accordance with claim 21, wherein  
the customer data is formatted in accordance with an access level by a method comprising:  
all customer data is associated with one or more access levels identifying the types of agents that should be allowed access to the data,  
all customer data is searched to find data having an access level that matches the individual agent, and  
the customer data document is assembled by compiling the data having a matching access level.

24. The method in accordance with claim 23, wherein  
an access address is assigned to the customer data document, which address refers to an area of a working memory occupied by the customer data document, and  
the access address of the customer data document is transmitted to the agent workstation.

25. The method in accordance with claim 24, wherein  
the customer data document is buffer stored in a working data memory,  
the working data memory is independent of the customer database, and

the agent workstation accesses the customer data document from the working data memory.

26. The method in accordance with claim 25, wherein  
the customer data document is created in a markup language, and  
the agent is provided with the customer data document from the agent workstation by a browser for the markup language.

27. The method in accordance with claim 26, wherein  
the customer data document is created as an HTML document, and  
the browser is an HTML browser.

28. The method in accordance with claim 27, wherein  
the customer data document is created as a HTML document,  
the working data memory is a webserver,  
a URL address is assigned to the HTML document, and  
the URL address is transmitted to the agent workstation to provide the agent with the customer data document.

29. The method in accordance with claim 27, wherein  
a URL address is permanently assigned to the agent workstation,  
the customer data document created as an HTML document is stored in a server  
assigned to the agent workstation,  
the server has an "update" function,  
the "update" function is triggered by a connection of a caller to the agent workstation,  
and  
the customer data document is opened by triggering the "update" function.